
Employee Name

ORIENTATION CHECKLIST Support Staff Employees

A. Office Manager

1. Welcome & Introduction to Staff
2. Provide orientation packet

Employee/Personnel Information:

1. Introduce Assistant Office Manager
2. Explain Time and Attendance records
3. Leave policy
4. FEHB program and election (explain window periods to enroll & make changes)
5. Life insurance and beneficiary selection (explain window periods to enroll & make changes)
6. TSP Program (explain window periods to enroll & make changes)
7. Employee Identification card
8. Application for Government credit card if appropriate
9. Building/office security procedures
10. Inclement weather procedure
11. Whistleblower Protection Act of 1989
12. Office of Inspector General Memo
13. Pre-tax transportation fringe benefit (APC 99-12)
14. Office security and emergency procedures and silent/fire alarm locations
15. Ethics for Government employees

List documents given/videos viewed:

Career Development:

1. Position Description
2. Explain probationary period
3. Explain appraisal system
4. Grade progression
5. Understudy desks
6. Bridge Program
7. Article 7 training opportunities and sources, i.e., in-house, web-based

- B. RD/ARD/RA/DRA (Region's Designee)
 - 1. Mission of Agency, history, and function
- C. Office Manager, Assistant Office Manager or Incumbent

Roles of Support Staff:

- 1. Docket Clerk
- 2. Election Clerk
- 3. Secretary to ARD
- 4. DRA Secretary
- 5. RA Secretary
- 6. RD Secretary
- 7. Compliance Assistant

Office Orientation:

- 1. Switch board/phones/voicemail
- 2. Photocopy machine
- 3. Fax machine
- 4. Postal meter/mail distribution
- 5. Office supplies and forms
- 6. Closed/Pending case files
- 7. Travel vouchers
 - (a) NLRB Intra Net, Administrative Services
 - (b) GSA federal travel regulations website – <http://www.policyworks.gov/org/main/mt/homepage/mtt/FTR/FTRHP.shtml>

Office Technology:

- 1. Assess computer-training needs
- 2. Computer/printer usage
- 3. CATS (Case Activity Tracking System) operation
- 4. Electronic forms
- 5. Agency website -- www.nlr.gov
- 6. Agency Intra Net
- 7. Provide Westlaw training -- www.westlaw.com
- 8. Provide Westlaw password
- 9. Internet policy and e-mail system
- 10. Department of Justice/National Advocacy Center training -- <http://www.usdoj.gov/usao/eousa/ole.html>

Labor-Management Relations:

1. Provide copy of Collective Bargaining Agreement

D. Supervisor or Region's Designee

Roles of Managerial Staff & Areas of Responsibility:

1. Regional Director
2. Assistant to the Regional Director
3. Regional Attorney
4. Deputy Regional Attorney

Roles of Professional Staff:

1. Field examiner functions
2. Field attorney functions
3. FOIA functions
4. Supervisory role
5. Compliance Officer/Supervisor

E. EEO Counselor

1. Welcome
2. Explain EEO policies/procedures
3. Policy on sexual harassment

F. Support Staff as Member of Regional Office Team (Region's Designee)

(Article 6, Section 4 opportunities)

1. Schedule observation of representation case hearing
2. Schedule observation of pre-election conference/election
3. Schedule observation of C-case investigation, i.e., affidavit-taking, interviews, etc.
4. Schedule observation of C-case trial
5. Observation of Information Officer visit

Completed: _____ Date: _____

Employee Name

ORIENTATION CHECKLIST Professional Employees

A. Regional Director or designee

1. Welcome & Introduction to Staff Members
2. Provide orientation packet

B. Office Manager

Employee/Personnel Information:

1. Introduce Assistant Office Manager
2. Explain Time and Attendance Records
3. Leave Policy
4. FEHB Program and Election (review window periods to enroll & make changes)
5. Life Insurance and Beneficiary Selection (review window periods to enroll & make changes)
6. TSP Program (review window periods to enroll & make changes)
7. Employee Identification Card
8. Building/Office Security Procedures
9. Inclement Weather Procedure
10. Whistleblower Protection Act of 1989
11. Ethics for Government Employees

List documents given/videos viewed:

12. Office of Inspector General Memo
13. Use of GSA cars
14. Use of rental cars for Government business
15. Travel Vouchers
16. Use of Government telephone calling card
17. Application for Government credit card & instructions for use
18. Office supplies and forms
19. Location of closed/pending files
20. Photocopy machine
21. Fax machine

22. Postal meter/mail distribution
23. Use of voice mail system
24. Support Staff Assistance Procedure
25. Pre-tax transportation fringe benefit (APC 99-12)
26. Office security and emergency procedures and silent/fire alarm locations

Labor-Management Relations:

1. Provide copy of Collective Bargaining Agreement

C. Supervisor

1. Welcome
2. Supervisor's role in office

Administrative Items:

1. Provide emergency contact telephone numbers (for problems in field)
2. Explain OPM background check
3. Explain Information Officer Program
4. Use of telephones
5. Use and security of computers, e-mail, laptop computers, and cell telephone
6. Rules and regulations concerning conflict of interest
7. Security and confidentiality of case files
8. Compensatory time procedures
9. Official travel procedures & Government Frequent Flyer rules
 - (a) NLRB Intra Net, Administrative Services
 - (b) GSA federal travel regulations website – <http://www.policyworks.gov/org/main/mt/homepage/mtt/FTR/FTRHP.shtml>
10. Explain other jobs in office
11. Case Docketing Procedure

Casehandling Items:

1. Issue set of Training Monographs
2. Issue set of Rules and Regulations, Casehandling Manuals and Guide to R-case law and Procedure
3. Explain use of Board Volumes
4. Explain use of Classification Outline
5. Explain use of Classification Index
6. Explain use of *Shepards* volumes
7. Case Routing Procedures
8. Explain Impact Analysis System and associated time targets
9. Issue Election Kit
10. Issue Hearing Officer's Kit
11. Explain Casehandling Log
12. Explain Case File Telephone Log

13. Explain Role of Counsel and Agency Procedures when dealing with represented and/or unrepresented parties or agents of parties
14. Explain Notice of Appearance and Exclusive Representative for Service
15. Explain CATS (Case Activity Tracking System)

Career Development:

1. Position Description
 2. Explain Probationary Period
 3. Explain appraisal system
 4. Grade progression
 5. Article 7 training provision
- D. RD/ARD/RA/DRA (Region's Designee)
1. Mission of Agency, history and function
- E. Supervisor or Region's Designee
1. Role of Managers (ARD, RA, DRA) & areas of responsibility
- F. Supervisor/Office Manager/Regional Designee

Office Technology:

1. Assess computer-training needs
 2. Computer/printer usage
 3. CATS (Case Activity Tracking System) operation
 4. Electronic forms
 5. Agency website -- www.nlrb.gov
 6. Agency Intra Net
 7. Provide Westlaw training -- www.westlaw.com
 8. Provide Westlaw password
 9. Internet policy and e-mail system
 10. Department of Justice/National Advocacy Center training -- <http://www.usdoj.gov/usao/eousa/ole.html>
- G. EEO Counselor
1. Welcome
 2. Explain EEO policies/procedures
 3. Policy on sexual harassment

H. Compliance Officer

1. Explain Compliance Procedures

I. FOIA Officer

1. Explain Freedom Of Information Act (FOIA) and FOIA Procedures

J. Further Substantive Training

1. Schedule observation/assist in representation elections (as available)
2. Schedule observation of R-Case hearings
3. Schedule observation of C-Case hearings
4. Schedule observation/assist in Joint Conferences
5. Schedule observation/assist in Settlement Conference (as available)
6. Schedule observation of affidavits
7. Explain use and give examples of:

Agenda Minutes
Final Investigative Reports
Recommendation to Defer

8. Explain Section 10(b) of the Act
9. Explain Section 10(j) of the Act and issue GC Section 10(j) guidance memo
10. Explain Collyer & Dubo deferral policy
11. Discuss R-Case procedures, including:

Processing petitions
Request to Proceed
Decision and Direction of Election
Requests for Review
Procedure for impounded and determinative challenged ballots
R-Case time targets

Completed: _____ Date: _____